



Washington State CDSMP Workshop Fidelity Checklist Instructions

Use this checklist to observe Lay Leaders and /or Master Trainers leading the workshop.

Stanford's self-management programs result in well-documented beneficial health outcomes for participants when the programs are implemented with fidelity. The recommendations below propose how the Workshop Fidelity Checklist can be used by Washington programs to help ensure the fidelity and effectiveness of programs.

Fidelity observation process

Leaders are told about program fidelity and observation during their initial training (or as soon as fidelity observation is started by an organization), and provided a copy of the Workshop Fidelity Checklist. It should be emphasized that program observation is done to ensure that programs are offered as designed, and that observation helps programs be more effective in achieving proven outcomes – helping Leaders see observation as an opportunity to improve programs and provide helpful feedback rather than something threatening.

Observation and completion of checklist are done by a Master Trainer or an experienced Leader if a Master Trainer is not available. Observer must be experienced with the program and able to provide constructive feedback in a positive way. If there is no observer available, co-leaders may use the checklist together as a guide to maintaining fidelity of their programs.

All Leaders are observed for one session during their first workshop series, and then for one session of a workshop on a regular basis (i.e. at least annually). It is recommended that observation take place during sessions

#2- #5 in order to ensure observation of action-planning, feedback/problem- solving, and brainstorming. The set of checklists includes all sessions, 1-6, so please use the checklist specific to the session being observed. Use the summary page as well as the session-specific checklists.

Fidelity observation logistics

Leaders are notified by the Master Trainer or program coordinator at least one week in advance of the observation. Leaders need to ask their group if they would be willing to be observed, and explain to the group how observation by an experienced Leader or Master Trainer helps ensure that programs are as effective as possible. The group needs to be informed that the observer is held to the same standard of confidentiality as the Leaders and the group members. If there is real concern about observation, Leaders need to discuss this with the observer and consider not observing this particular group.

The observer arrives before the program begins, and stays through the full session. If this is not possible, the observer must plan to arrive or leave during the break, but not during other parts of the session. The observer is not introduced briefly to the group, and should sit in the back of the room, not joining in as a participant.

The observer uses one checklist for each Leader. The checklist helps to identify program logistic issues, and Leader strengths and possible areas for improvement. The observer is also encouraged to provide comments that will help the Leader – positive feedback on strong areas, and suggestions for possible improvements.

Fidelity observation follow-up

If possible, the observer follows up with Leaders immediately after observation to share the feedback – using the feedback process used in Leader training and asking Leaders to speak first about how they felt the session went. If it is not possible for the observer to talk immediately with the Leaders, feedback is provided by the observer or coordinator as soon as possible in person or by phone. The checklist is

returned to the coordinator or lead contact at the licensed organization. A copy of the checklist may also be provided to the Leader.

Organizations are advised to develop a system (i.e. Excel spreadsheet or simple checklist) to track Leader observations, initial and annual observations thereafter. It is also recommended that the observer submit completed checklists to the local program coordinators, who keep the completed fidelity checklists on file.

Concerns about Leader effectiveness

If there are real concerns, a Leader should be re-observed soon a second time to ensure that recommended changes have been made. If concerns continue, the Master Trainer needs to work with the Leader one-on-one to correct the problem and/or consider not using that Leader for future programs.